

**STUDENT ACHIEVEMENT MINNESOTA (“SAM”)  
Charter School Start-Up Progress Form/Task List**

School: \_\_\_\_\_

Date: \_\_\_\_\_

	<b>Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Status</b>	<b>Targeted Completion Date</b>	<b>Actual Completion Date</b>
<b>Facilities</b>						
1	Conduct needs assessment					
2	Identify options					
3	Evaluate/inspect potential sites					
4	Review codes/ordinances/regulations					
5	Obtain resources for financing a facility					
6	Select site, consider expansion potential					
7	Consider how the facility supports the learning program					
8	Acquire site, letter of intent					
9	Enlist facility design help					
10	Consult with Dept of Education regarding lease aid					
11	Address building security issues					
12	Secure renovation financing					
13	Finalize lease					
14	Make necessary repairs/installations					
15	Arrange for custodial/maintenance services, if needed					
16	Establish insurance policies					
17	File certificate of occupancy					
18	Initiate school signage					
19	Check for handicap accessibility					

<b>Financial Management/Business Plan</b>						
20	Create a comprehensive business plan which includes a 4 year budget projection and 4 year market analysis					
21	Identify potential board members with a financial background					

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22	Meet individually with Dept of Education staff members concerning: MARSS, UFARS, EDRS, lease aid, IDEAS payment system; and CLICS					
23	Establish relationship, open account with local banking institution					
24	Refine planning grant budget if necessary					
25	Designate financial manager for school					
26	Hire auditor					
27	Establish financial policies prior to receiving revenue (e.g. access to money, identify signature authority, identify approval levels)					
28	Establish separation of duties					
29	Develop internal controls and fiscal policies					
30	Develop and monitor cash flow plan					
31	Acquire forms (purchase orders, etc.)					
32	Schedule monthly board financial review					
33	Identify and purchase financial management software					
34	Identify a team member to provide SAM with monthly financial updates for grant money					
35	Establish line of credit to cover cash flow/holdback shortages					
36	Draft and adopt Procurement policy					

#### **Governance and Management**

37	Ensure charter contract with SAM is signed within 45 business days of MDE approval					
38	Review open meeting law					
39	Determine governance structure					
40	Recruit board members with specific expertise (law, finance, real estate)					
41	New board members execute Statement of Assurance					

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42	Develop by-laws					
43	Define committees and write descriptions					
44	Distinguish board roles and responsibilities					
45	Develop job description for Board of Directors and Officers					
46	Each board member signs conflict of interest policy					
47	Develop a board manual					
48	Establish a board calendar					
49	Define communication methods to school leaders, staff, and community					
50	Identify legal status, tax-exempt status, MN charitable org, file for 501(c)(3) exemption					
51	Obtain board liability insurance (Directors and Officers)					
52	Perform board self-evaluation					
53	Plan for transition of permanent board					
54	Write and adopt necessary policies					
55	Adopt evaluation process for school leader prior to school opening					
56	Review potential conflicts of interest					
57	Schedule mandated board trainings					

**Learning Program**

58	Develop scope and sequence of learning results					
59	Identify instructional strategies the school will use to achieve academic goals					
60	Develop curriculum-based measures to track progress toward academic goals					
61	Purchase curriculum materials					
62	Identify and plan for any curricular staff development needs					
63	Align instructional plan to Minnesota state standards					

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64	Each teacher prepares daily lesson plans for period established by school leader					
65	Decision re: early K/1 enrollment policy					
66	Purchase appropriate standardized assessments					

**Systems**

67	Finance – Perform cost benefit analysis of systems, purchase appropriate system					
68	Student information – Perform cost benefit analysis of systems which possess various sort capabilities (including by demographics, purchase appropriate system					

**School Culture**

69	Develop a school disciplinary policy that is compliant with the MN Pupil Fair Dismissal Act					
70	Train staff in implementation of discipline policy, student conduct					
71	Develop an intake process for students and families					

**Leadership, Personnel, and Policy  
Development**

72	Define roles and responsibilities of start-up coordinator (e.g. what can and cannot be done with board approval)					
73	Hire start-up coordinator					
74	Identify recruiting sources					
75	Establish personnel policies/handbook					
76	Create student and parent handbook/policy manual					
77	Determine staffing needs					
78	Develop hiring policies and procedures					

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79	Establish terms of employment					
80	Design benefit packages, vacation policies, workers compensation, etc.					
81	Develop employment contracts					
82	Develop staff policies					
83	Develop job description for school leader; hire school leader					
84	Write/post job descriptions for non-leader positions/ads					
85	Screen and select potential candidates					
86	Conduct background/reference/license checks					
87	Conduct orientation					
88	Create personnel files					
89	Design discipline policies, code of ethics, and student responsibility code					
90	Draft and adopt Mandatory Policies: Equal Educational Opportunity; Out of State Travel by Board Members; Equal Employment Opportunity; Disability Nondiscrimination; Public and Private Personnel Data; Employee Right to Know – Exposure to Hazardous Substances; Family and Medical Leave; Expense Reimbursement; Harassment and Violence; Chemical Use and Abuse; Drug-Free Workplace/Drug-Free School; Tobacco-Free Environment; Communicable Diseases and Infectious Conditions; School Weapons; Search of Student Lockers, Desks, Personal Possessions, and Student’s Person; Student Discipline; Bullying prohibition; Protection and Privacy of Student Records; Student Medication; Student Disability nondiscrimination; Student Sex Nondiscrimination; Internet Acceptable					

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	Use and Safety; Hazing prohibition; Pledge of Allegiance; Use of Peace Officers and Crisis Teams to Remove Students with IEPs from School Grounds; Wellness; Curriculum and Instructional Goals; Curriculum Development; Development of Parental Involvement Policies for Title I Programs; School System Accountability; Student Transportation Safety; Crisis Management; Reporting Illegal or Unethical Activity; Dress Code; Religion; Equal Access to Facilities; Data Practices					
91	Develop a school calendar					
92	Acquire medical forms (students and staff)					
93	Design teacher evaluation system					
94	Design staff development plans					

**Regulatory Issues**

95	Review your state charter school law					
96	Review civil rights/equity issues					
97	Develop health & safety policy handbook					
98	Develop a crisis management plan					

**Services to Students: Special Education**

99	Identify and hire SpecEd Director					
100	Identify and hire SpecEd Teacher(s)					
101	Assign interim board member to ensure SpecEd Assurances checklist is fulfilled					
102	Identify contractors for supplemental services (speech, psychologist, etc.)					
103	Identify staff member to learn EDRS to ensure flow of Special Education funding					
104	Identify staff member responsible for Special Education record-keeping procedures and district bill-back					
105	Create process to identify special needs students					

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<b>Services to Students: ELL</b>						
106	Establish identification and release process for ELL students					
107	Hire ELL teacher					

<b>Enrollment/Marketing</b>						
108	Create a marketing committee					
109	Develop a marketing plan					
110	Identify strategies to deal with external controversy/internal conflict					
111	Develop database of potential students and families					
112	Enrollment to date					
113	Develop appropriate communications materials (brochures, newsletters)					
114	Identify community events at which to market the school					
115	Consider hiring a marketing/enrollment coordinator					
116	Identify and implement parent and community involvement opportunities					
117	Identify strategies to recruit a diverse student body (community groups, etc.)					
118	Identify and implement strategies to avoid burnout					

<b>Accountability</b>						
119	Set date, prior to opening, to participate in readiness review					
120	Set date for board to establish goal setting					

<b>Community Partnerships</b>						
121	Identify potential community partners, develop plan to build relationships					

## Significant Target Dates

- March 1: School leader identified
- March 1: Facility secured
- May 1: Database of interested students/families that is 125% of budgeted enrollment
- May 10: Significant renovations/buildout to facility have begun
- May 31: 75% of projected budgeted students officially enrolled
- June 1: 75% of teaching staff hired
- July 1: 125% of projected budgeted students officially enrolled

Where Significant Target Dates not met, the School board will submit a written plan to SAM detailing how the condition will be remedied within 30 days of the Significant Target Date. Note: When Student Achievement Minnesota does not believe the school is ready to open, Student Achievement Minnesota counsels the school to delay opening and, if necessary, intervenes to prevent the school from opening.